Chapter 2

Updating Pay, Benefits, and Entitlements Data

Chapter Overview

Introduction

This chapter shows you how to manage PB&E data.

- You must use the RPA to update benefits that require the production of a NPA, such as:
  - Federal Group Life Insurance (FEGLI).
  - Retirement plan information (CSRS, FERS).
  - TSP.
- You can update PB&E data through the **People** Window → <**Assignment**> for benefits that do not require an RPA, such as:
  - Health Insurance.
  - Government Awards.

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See Also

Module 1, Fundamentals of the Modern DCPDS
- Chapter 4, Dated Information and DateTracking
- Chapter 5, Updating and Viewing the Employee Record

Module 3, Processing Requests for Personnel Actions Using the Modern DCPDS
- Chapter 1, Processing a Request for Personnel Action

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Chapter Overview, Continued

Who Does It?

You must be in the role of Personnelist.

Before You Begin

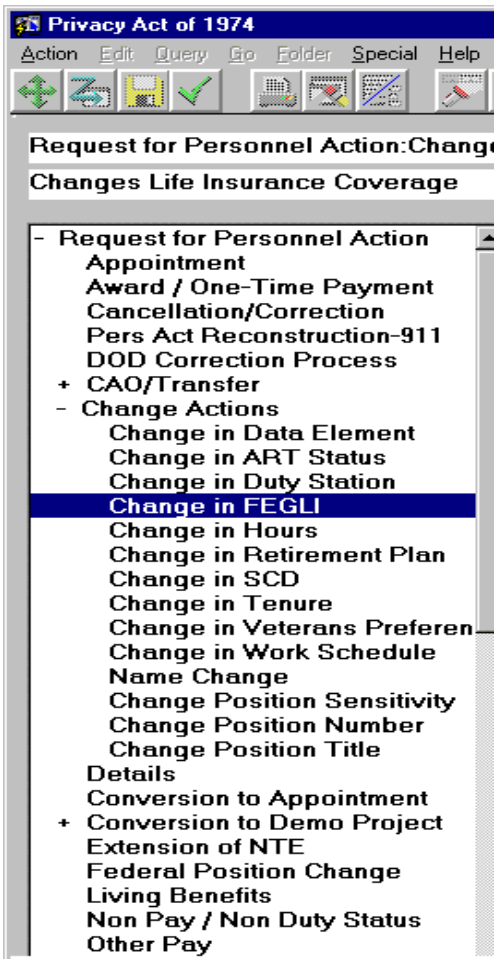
- PB&E is initialized upon an appointment action. Some elements, such as life insurance and TSP have a waiting period before the elements can be updated or an initial entry made.
- To enter an element for an employee:
  - If necessary, change the effective date to the correct date for making the element entry by DateTracking.
  - If the pay period is closed at the effective date, you cannot make any non-recurring entries of elements that process in payroll runs.
- Use the **Element Entries** Window to make and review manual entries to input values for individual employees.
- If the element you need to add or change is not found in the **Elements Entries** Window, you can select it from the **Elements** LOV.

Processing a Change in FEGLI (Using the RPA)

Purpose

This procedure guides you through the steps for updating the PB&E area in an employee's record using the RPA. The example is for a Change in FEGLI.

Accessing the RPA

Step	Action
1	On the **Navigation List** → *Request for Personnel Action* → *Change Actions* → *Change in FEGLI* → <**Open**>. 

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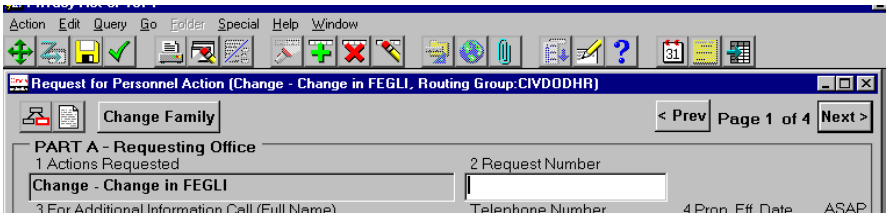
Processing a Change in FEGLI (Using the RPA), Continued

Accessing the RPA (continued)

Step	Action
2	The RPA displays with the **Change in FEGLI** populated in **PART A – Requesting Office**. The ***Action Requested***, ***Nature of Action Code***, and ***Legal Authority*** populated with the NOA Code and clear text. Complete the following data fields: 

Data Field	Action
Part A – Requesting Office	Click the LOV or type in the information.
Part B – Last Name	Click the LOV or type in the information. The full name, SSN, and DOB populate.
Part B – Effective Date	Click the LOV or type in the date using the format of DD-MMM-YYYY.

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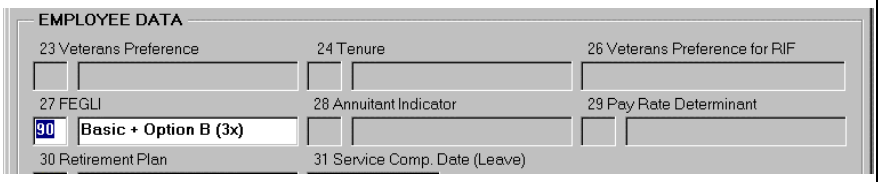
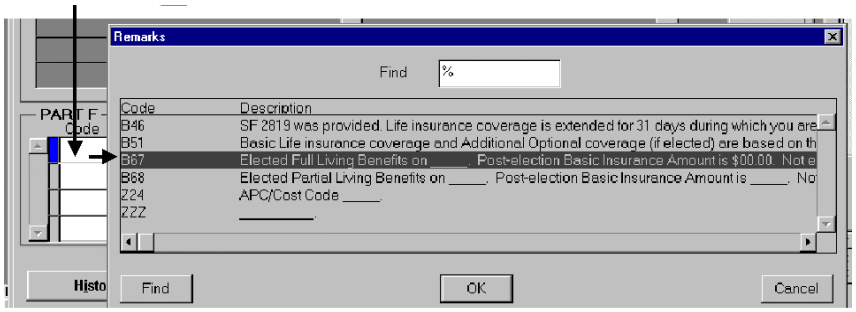
Processing a Change in FEGLI (Using the RPA), Continued

Completing the FEGLI Change

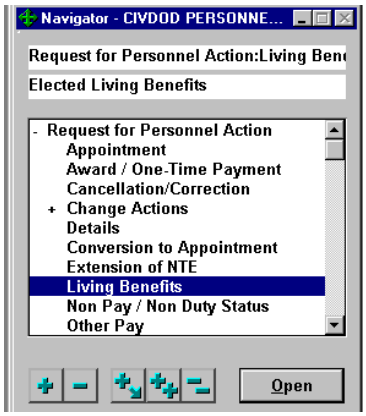
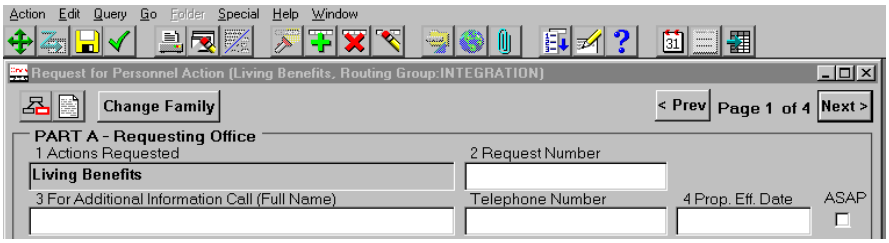
Step	Action
1	Click <**Next**> at the top of the RPA to advance to page 3. No information is needed on page 2.
2	With your cursor in the ***FEGLI*** data field, click the LOV and select the information needed. Click <**OK**>. 
3	Click <**Next**> to advance to Page 4. With your cursor in **Part F**, **Remarks**, click the LOV. Select the appropriate remark and click <**OK**>. Repeat the procedure if more remarks are needed. 
4	Click Save and route the request as required by Component business rules.

Processing a Living Benefits Election

Purpose

This procedure illustrates how to process full or partial Living Benefits Election by an employee.

Accessing the RPA

Step	Action
1	On the **Navigation List** → *Request for Personnel Action* → *Living Benefits* → **<Open>**. 
2	The RPA displays with the **Living Benefits** populated in **PART A – Requesting Office**. Complete the other data fields as required. 

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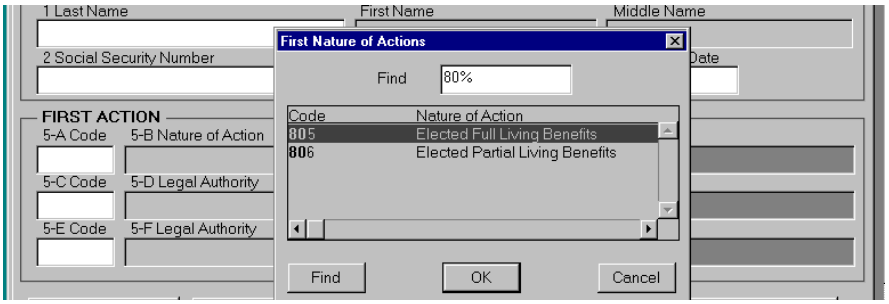
Processing a Living Benefits Election, Continued

Completing the Living Benefits Election

Step	Action
1	With your cursor in the blank data fields of **Part A - Requesting Office** Region, click the LOV and make appropriate selections. Click <**OK**>. Or type in the information.
2	With your cursor in **Part B – For Preparation of SF-50** Region, retrieve the employee's information by typing in either the last name or social security number to automatically populate the data fields. You can also use the LOV on the Toolbar.
3	In the ***Effective Date*** data field, enter an effective date for the Living Benefits election. • Type in a date using the format: DD-MMM-YYYY. *Or* • Click the LOV to display the calendar to select and enter a date.
4	Click in the ***5-A Code*** data field and click the LOV. The **First Nature of Actions** Flexfield displays with **Living Benefits Nature of Action** codes listed. Select a code and click <**OK**>.  The corresponding ***Nature of Action*** and ***Legal Authority*** data fields display in the appropriate data fields.

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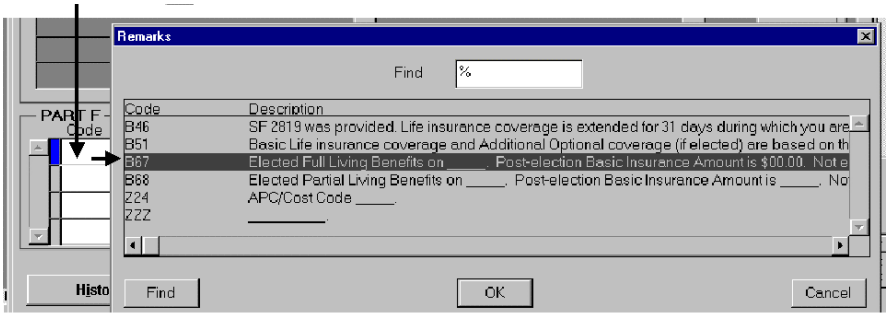
Processing a Living Benefits Election, Continued

Completing the Living Benefits Election (continued)

Step	Action
5	Click **<Next>** on the RPA to access **RPA – Page 4**.
6	**In Part F – Remarks for SF-50** Region, click the ***Code*** data field, then click the LOV to display a list of FEGLI related remarks. Click the appropriate remark and click **<OK>**.  To add additional remarks, click the next ***Code*** data field and repeat the procedure.
7	Enter required remarks in the ***Remarks for SF-50*** data field (**RPA - Page 4, Part F**). Click the LOV to display a list of applicable remarks.
8	Insert any data required to complete a remark (indicated by a blank, underlined space). **Note:** Do not include a period at the end of the inserted data, the system populates the data with a period. If you do include the period, it will result in two periods on the NPA when it is printed.
9	To add additional remarks, click the next ***Code*** data field and repeat the procedure. If there are more than four remarks, click the last ***Code*** data field and click the down arrow on your keyboard to insert additional remarks.
10	Click Save and route the request as required by Component business rules. **Note:** There is no change to the ***FEGLI*** data field (**RPA – Page 3**).

Initiating or Updating a PB&E Element (Without an RPA)

Purpose

This procedure illustrates how to initiate a new data element (for example, Living Quarters Allowance), or update an element when a NPA is **not** required.

Initiating a New Element

Step	Action
1	From the **Navigation List** → *People* → *Enter and Maintain* → **<Open>**.
2	The **Find Person** Window displays. Query for the employee by either their name or social security number.
3	The **People** Window displays. If the effective date of the data change is not the current date, click Alter Effective Date on the Toolbar and alter the effective date.
4	Click <**Assignment**>. The **Assignment** Window displays.
5	Click <**Entries**>. The **Element Entries** Window displays.
6	If no data displays in the ***Element Name*** data fields (e.g., for a future dated action), then: • Click the first ***Element Name*** data field. • Click **Query** → **Run** on the Main Menu Bar. If data displays in the ***Element Name*** data fields, go to step 7.

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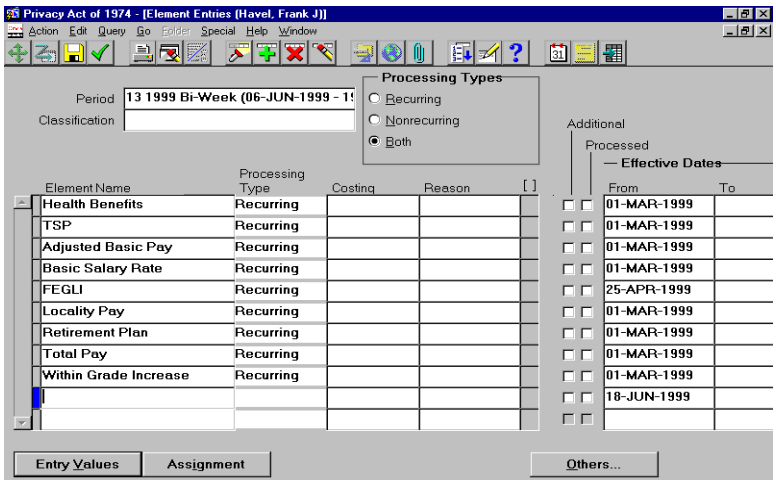
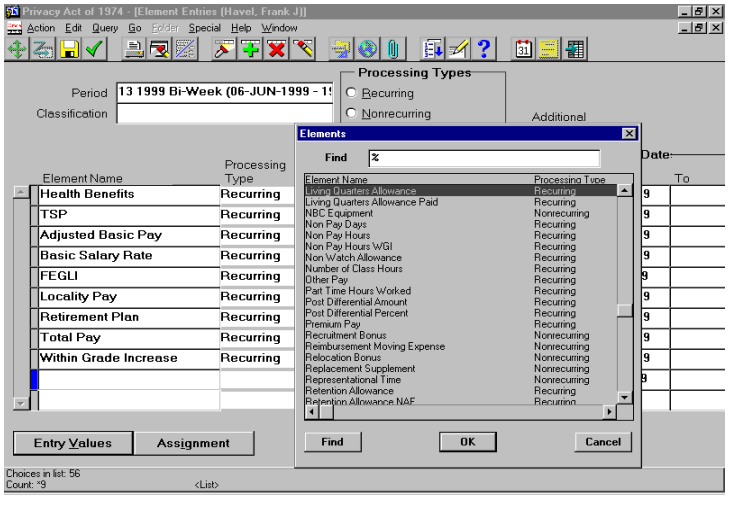
Initiating or Updating a PB&E Element (Without an RPA),
Continued

Initiating a New Element (continued)

Step	Action
7	Click the first blank ***Element Name*** data field.  **Note:** If there are no blank fields, click in the last one then "arrow" down until a blank field displays.
8	Click the LOV, select the appropriate item, and click <**OK**>. Click <**Entry Values**>. 

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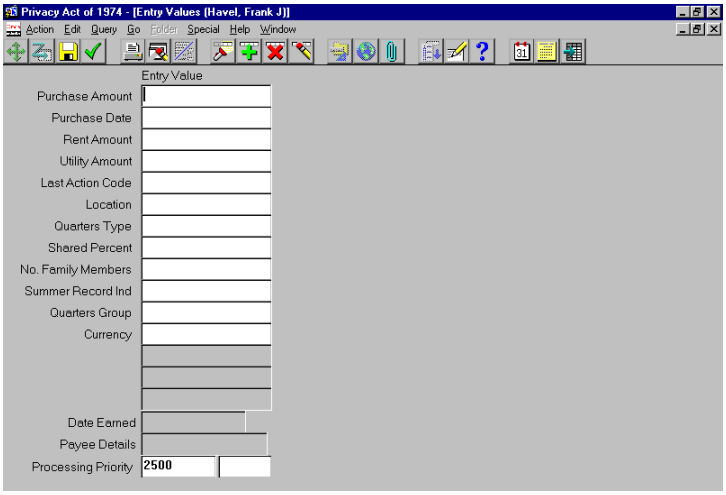
Initiating or Updating a PB&E Element (Without an RPA),
Continued

Initiating a New Element (continued)

Step	Action
9	The **Entry Values** Window for the selected element displays. Complete the data fields and click <**OK**>. 
10	Click **Save** and exit the windows.
11	If the effective date was altered, click the **Alter Effective Date** button on the Toolbar and click <**Reset**> on the **Alter Effective Date** Window to return the effective date to the current date.

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Initiating or Updating a PB&E Element (Without an RPA),
Continued

Updating an Element

Step	Action
1	Follow steps 1-6 of **Initiating a New Data Element** in this chapter.
2	Click the appropriate ***Element Name*** data field (e.g., Health Benefits).
3	Click <**Entry Values**>. The **Entry Values** Window displays.
4	Click the data field you need to change.
5	Click the LOV button, select the item, and click <**OK**>.
6	If you are changing existing data, an **Option** Window displays asking you to choose Update or Correction. • Click <**Update**> to change the record as of the effective date you specify. When you update a record, all previous information is preserved and can be viewed in history. • Click <**Correction**> if the previous data was incorrect. The new information will override the previous information back to the date the error occurred. (Refer to Module 1, Fundamentals of the Modern DCPDS, Chapter 4, Dated Information and DateTrack, for more information about updates vs. corrections.)
6	Click **Save** and exit the window. The Message Line will indicate that the transaction is complete and has been applied and saved.
7	If the effective date was altered, click the **Alter Effective Date** button on the Toolbar and click <**Reset**> to return the effective date to the current date.